OPI Montana Office of Public Instruction • Linda McCulloch, Superintendent • www.opi.mt.gov

Quick Tips for Electronic Grant (E-Grant) Navigation

The following information describes the basic steps that must be followed to complete the ESEA/NCLB consolidated application. In-depth instructions are found on the top right-hand corner of each application page that requires an entry. Click on the instructions link to open the PDF file.

System Requirements:

• PC's (Windows Operating System
    Versions: 98, NT, 2000, XP)
• Internet Browsers
    – Netscape (6.1+) OR
    – Internet Explorer (IE) (5.5+)
• Note 6.0 or higher preferred
• IE is **not** supported in the Mac environments.
Safari is advised on a Mac but has not been
completely and thoroughly tested so the user
may experience occasional odd behavior.
    – AOL Browser is not compatible with this system
    – It works with a dial-up connection, but slower.

Pop- up Blockers must be disabled! If not disabled the system won't function properly.

Important System Functions:
- Do not use the browser BACK button. All entries on the page will be lost and you will be required to log-in again.
- Click ONCE to access functions.
- Pop-up blockers must be turned off in order to access critical elements of the system. When first logging on to E-grants, click on Tools on the Browser; click "Turn Off Pop-up Blocker." This step needs to be taken only once- the first time at log on.
- Click the SAVE PAGE button on each screen that requires an entry before moving to another section. Scroll to the top of the page after clicking the button to check for red validation messages. All errors indicated must be corrected; click the SAVE PAGE button in order to save information on the page. The Calculate Totals button does not save the page.
- The system has a 60-minute time-out. Any information not saved as indicated above will not be saved if the system times out.

- Critical messages will be sent through official e-mail only. Follow directions for the Contact page if additional staff should receive the e-mails also.
- Print All: This function should be used sparingly as it results in a 100 plus page document. Because it is so large, preparation for printing is done outside of the system and generally occurs overnight and after all users are logged out of an application. The requestor will receive two e-mails: when the request is made and when the document is ready for printing. A record will remain on the application indicating date and name of the requestor.

Districts that choose to not apply for funds:

1. The simplest method for a district to not apply for their NCLB funds is to not create, complete or submit any section of the NCLB consolidated application. The district must notify the OPI of their intent to refuse funds by sending a signed letter to Nancy Coopersmith, Assistant Superintendent. The letter must be specific about which program funds they choose not to apply for.

2. If a district chooses to apply for <u>any</u> of the ESEA/ NCLB program funds, they must complete the common and program assurances and the private/non-public equitable share pages for all programs in order to pass validity checks.

Moving Funds under Schoolwide Option

Before any funds can be moved into Schoolwide, all Title I Part A Program Detail tabs must be completed. Select Title I Part A from the Menu and complete questions under Topic 1, Topic 2, Topic 6, and all Targeting Steps (1-4). You must enter at least $1 in the set aside for Administration on Targeting Step 4 in order for the system to work. If there are other set asides your district is required to complete, enter those amounts as well.

Return to the ESEA/NCLB Consolidated section on the Menu and move the appropriate amount of funds under each Title program that will be used in the Schoolwide program. If you have participating private/nonpublic schools, the funds for services to those students cannot be moved into Schoolwide, but must be left in each specific Title program in which they are participating. The Equitable Share pages for all the Titles must be completed even if there are no participating private/nonpublic schools. If there are no participating private/nonpublic schools, you will not need to complete any other program detail sections for any Titles from which funds are moved into Schoolwide.

If the district is eligible for REAP-Flex and also has all Schoolwide programs K-12, don't use the REAP-Flex option to move funds. Skip that step and go directly to the Title I Program Detail and then use the Schoolwide option for moving the

funds, especially if you want all the funds (or all except $1) to go into the Schoolwide Program budget.

The following information is sequential, following the order that the application should generally be completed. Exceptions are noted within the Instructions or on the application page itself.

1. Security

Each district or organization must apply to the Office of Public Instruction (OPI) for security ID's in order to access the E-Grant system. The forms are available at: http://opi.mt.gov/ITProjects/E-Grants.html under the "Training and Information" tab. Two forms must be signed by the authorized representative and returned to the OPI: http://opi.mt.gov/PDF/ITProjects/EGrants/EGrant_Account_Request.pdf and http://opi.mt.gov/PDF/ITProjects/SecurityCoordinator_App.pdf .

The first time the E-Grants application is accessed, users will be directed to the Montana state ePass system. Follow the directions to achieve a password for ePass, and then click on E-Grants. You will be redirected to the OPI logon page. Enter the OPI-generated ID and your own password. Each entry after these steps will require use of one password only.

2. Planning Tool

The Planning Tool must be completed before moving through the program and budget detail pages. Complete those "Topic Areas" where indicated mandatory for the programs you are applying for. Click the Save Page button at the bottom of each applicable page. There is no final "submit" or other end task button. Upon completion of the Planning Tool pages, move to the Click to return to Menu List section at the top right-hand corner of the page. Click on the formula grant program and select ESEA/NCLB Consolidated Application.

3. **ESEA/NCLB Consolidated Application First Tier Tabs**
   a. Overview – read only. No action is required.
   b. Contact – Enter summer telephone numbers for the authorized representative and district clerk. Add other staff as appropriate. Scroll to the bottom of the page. Add up to five e-mail addresses for staff that should receive notice when the application is denied or approved.
   c. Funding (Allocations) - the top section shows allocations for each program within ESEA/NCLB and is read only. Use the middle section to indicate redirection (transferring or flexing) of funds. Eligibility information for either option is provided. The next section is used to show transfers of funds to schoolwide programs. The

final section is used to refuse program funds from the current or prior year. All calculations are completed by clicking on the Calculate Totals button; when the information entered is correct, click the Save Page button.

Topic Funding - this page indicates which Program funds are mapped to a Topic Area and require one or more goals on the Planning Tool section. Mandatory checkboxes cannot be deselected. Title VI is the sole program that can select Topic Areas on this page. Click the Save Page button to indicate that the information is correct whether or not changes are made to the Title VI column.

General Transferability and Small Rural Schools Tabs – information only; no action required.

d. Private/Nonpublic – Enter data regarding participating schools, if any. An equitable share calculation page is attached to each program detail section; the page is included to validate what has been calculated for each non-public student participating in NCLB programs.

Note: Applicants must enter data for the Title IIA, IID, III, IVA, VA, and the Title I-A Targeting Step 4 page, in the Program Detail: Private/Nonpublic equitable share pages, entering zero if it applies, in order to pass the validation checks.

e. Grant Summary – information only; provides summary by Purpose Category or Object Code of all budgeted funds.

f. Assurances – The Common Assurances and title specific assurances are presented under separate tabs. The authorized representative is the only person who will have access to the check box which indicates that the Assurances have been read and accepted. The General and Common Assurances are presented under separate tabs, by tab. Each tab must be completed as instructed.

Return to the drop-down menu on the top right side list. Click the section and scroll to the specific title program to complete the program application sections.

4. **Program Level (i.e. Title I, Title IIA, etc.) Second Tier Tabs**
   a. Overview – read only
   b. Program Detail – read the material in the instructions link at the top right side for specific navigation and completion details. There will be a variety of check boxes, radio buttons, text boxes and further

details that are required when some check boxes are checked. Pay attention to specific maximum character limits for text boxes. Click the SAVE PAGE button on each page before moving to the next page. Data will not save automatically. Check for red validation messages at the top of each page before moving on. No data on the page is saved if there are red validation messages.

Note: Applicants must enter data for the Title IIA, IID, III, IVA and VA in the Program Detail: Private/Nonpublic pages, entering zero if it applies, in order to pass the validation checks.

c. Budget Detail – follow the instructions; allocations must be budgeted 100%. Entries into unallowable columns or rows will generate an error message. Fields are open only for allowable purpose categories and object codes for the specific program.
d. Budget Summary – read only
e. Page Locking – this function locks pages to assure no further changes are made. It can be reversed by clicking the unlock page text.

5. Return to ESEA/NCLB Consolidated higher tier Tabs

Submit – the authorized representative is the only person that can submit a completed application.
Consistency Check – the authorized representative will be required to click the Consistency Check button before submittal will be accepted by E-Grants. Any errors, indicated in red at the top of the page, must be corrected before the application can be submitted. A successful Consistency Check will lock the application. After this step, unlocking the application will require a second Consistency Check prior to submittal to assure that the data continues to be correct.

Application History – This section will provide access to all versions of the current application, amendments and future applications. Click this tab to see current status of applications.

Page Locking – the authorized representative can chose to lock the entire application or specific sections.   A successful Consistency Check will lock the application; the action can be reversed at any time.

Review Summary – This function is placed on the first page of the ESEA/NCLB Consolidated Application. Select the appropriate application or amendment, and then click the Review Summary button to read comments from the OPI review process. This function is only available after the application has been submitted and approved or rejected by the OPI.

OPI technical assistance, review and approval

OPI Application Review – staff can provide technical assistance during the development process only when the authorized representative selects the "consulting" button on the Submit page. The authorized representative may choose to complete this function early in the process to assure quick help from OPI. This allows district and OPI staff to view the application at the same time. OPI staff cannot change or enter information during any phase of the application or after submittal; these data entry tasks can only be performed by the district.

If an application is denied or approved, an e-mail will be sent to the authorized representative and others as indicated on the Contact tab.

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